
**DCSS P3 PROGRAM
CASEWORKER STAFFING
SEPTEMBER 15, 2000 MEETING
MEETING SUMMARY**

A. GENERAL

On Friday, September 15, 2000, the California Department of Child Support Services (DCSS) Policies, Procedures, and Practices (P3) Program, Caseworker Staffing Workgroup held its fourth session in Sacramento. The following members attended:

- ☐ Jo Vonn Dailey-Miller (DCSS Analyst)
- ☒ Mike Farrell (DCSS Co-Leader)
- ☒ Patricia Gore (Small County)
- ☒ Brian Hocking (Large County)
- ☒ Betty Holland (SEIU)
- ☒ Cherie Karnes (Medium County), Scribe
- ☐ Hossein Moftakhar (DCSS Analyst)
- ☒ Deborah Mullin (Judicial Council),
- ☐ Debra Olvera (County Analyst)
- ☐ Barb Sanders (OCSE)
- ☒ Kathy Yolton (County Co-Leader)

Attending *ex officio* were:

- ☒ Kathie Lalonde, Facilitator (SRA International)

This meeting summary highlights points covered, material discussed, decisions made, and follow-up tasks for forthcoming sessions. Comments and corrections should be addressed to scribe Cherie Karnes at e-mail cherie.karnes@mail.co.ventura.ca.us.

B. REVIEW OF LAST MEETING MINUTES:

Minutes were reviewed and approved with following clarification of the Survey Table attachment: we verified Ventura county as "Functional" (the previous notation was uncertain).

C. TODAY'S AGENDA

The group amended its previously announced agenda to include:

- Review Short Report for the Forum presentation
- Discuss upcoming Public Forums
- Guest speaker: attorney for SEIU

D. UNION ISSUES

Vin Harrington, attorney representing SEIU, gave a brief presentation of the issues of the Union's involvement regarding caseload per caseworker. He distributed a handout regarding Meet and Confer Obligation established by the Meyers-Milias Brown Act. Members of the Workgroup raised various questions. The group agreed that we are looking at caseload standards strictly for the "State" organizational structure, not as a Meet and Confer issue with the Union. We may include in our final report a recommendation that the State further explore the implications regarding staffing versus caseload issues.

E. PUBLIC FORUMS

Kathie Lalonde clarified the information regarding the upcoming public forums and who would be attending:

- San Luis Obispo CFSC - Mike Farrell and Debra Olvera
- Judicial Council - Mike Farrell and Deborah Mullin
- Los Angeles - Mike Farrell and Brian Hocking
- Sacramento: Mike Farrell and Patricia Gore.

It was noted that Kathy Yolton and Betty Holland would not be able to attend, as previously scheduled. After the forums are completed, information will be given to the Workgroup to include in their final recommendations.

F. HOSSEIN'S INFORMATION

Mike Farrell handed out and discussed Hossein's handouts in his absence: the normal distribution/ bell curve regarding cost effectiveness, and the combined summary for caseworker and attorney survey results.

G. JOVON DAILY'S SUMMARY OF OTHER STATES

Mike Farrell also handed out and discussed the information from other states regarding staffing. It was noted that most of the methodology of other states was not applicable. The report from Washington was distributed, and issues of staffing versus efficiency were addressed, along with the setting of minimum staffing ratios.

The Colorado report by PSI (7-5-00) provided the following information:

- New Jersey study (1990): 600 cases per worker
- Montana informal study: 400-500 cases per worker
- Oklahoma informal study: 350 cases per case worker
- Virginia study (1995): no ratios specified

It was found that the other studies all showed approximately the same results: caseloads of 300-600 per caseworker.

H. CASES vs. CASEWORKER RATIO

The chart from the Summary of Other Counties (9-1-00) was reviewed, along with Hossein's charts and handouts from Orange County staffing. The consensus of the group, based on the information we have at this time, is to recommend in our report caseloads in the range of 300 to 400.

I. SHORT REPORT

Kathie LaLonde handed out a copy of the draft of the short report for review. Revisions were made, and she will e-mail the group with the final copy.

J. DRAFT FINAL REPORT

The draft final report will be due 10-2-00. Information gathered from the forums will be provided to the work group to be included in the final report that will be due shortly after the last meeting in October. No specific date was given at this time.

Assignments were given to begin writing the report in accordance with Appendix A of the Style Guide:

- Chapter 1 - SRA to prepare
- Chapter 2 Process - Deborah Mullin and Cherie Karnes
- Chapter 3 Results - Mike Farrell, Kathy Yolton, and Brian Hocking
- Chapter 4 Next Steps - Mike Farrell, Brian Hocking, and Kathy Yolton
- Executive Summary and Collate - Debra Olvera

Assignments should be completed and sent to Debra no later than 9-25-00. Also, authors will e-mail copies to other members of the group to be reviewed before the meeting on 9-29-00.

K. OTHER ISSUES

Mike gave a brief report of the joint Attorney/Caseworker Staffing Workgroups meeting on September 14. Kathy Yolton, Cherie Karnes, and Brian Hocking also attended. Brian took notes of this meeting.

Kathie LaLonde asked if everyone had accessed the information on the web site. If you identify any problems, notify Kathie or Larry. It was noted that eventually there will be a public segment on this site.

L. HANDOUTS

Vin Harrington – Outline of a Meet and Confer Obligation

Mike Farrell – Jo Vonn Daily's Summary of Staffing from other states

Kathie LaLonde - Staffing Caseworkers Recommendations "short form"

Kathy Yolton - Orange County staffing requirements

Mike Farrell - Hossein's Summary of Caseworker and Attorney Survey Results & Chart: Normal distribution/ bell curve

M. CROSSOVER ISSUES

The Management Practices Workgroup should be consulted regarding use of caseworker staff for non-casework functions—e.g., fiscal duties.

N. ANCILLARY (PARKING LOT) ISSUES

None.

O. AGENDA FOR SESSION 5–SEPTEMBER 29, 2000

Review and finalize draft final report.

P. ACTION ITEMS

Action Item	Date Recorded	Assignee	Date Due	Date Closed	Resolution
Provide county staffing/caseload data Including CS157	7/14	H. Moftakhar	7/28	7/28	Done
Individual members provide Brian with county staff job descriptions for their counties	7/14	K. Yolton, C.Karnes, P. Gore, B. Hocking, D.Mullin	7/28	7/28	Done
Survey counties - Pilot	7/14		7/28	7/28	Done
Obtain Price Waterhouse (LA County) and Orange County reports	7/14	K. Yolton	7/28	7/28	Done
Provide county staffing/caseload data	7/28	H. Moftakhar	8/25	8/18	Done
Obtain job descriptions from counties for county staff	7/28	B. Hocking	8/25	8/18	Done
Bring definition of caseworker in your individual county	7/28	K. Yolton, C.Karnes, P. Gore, B. Hocking, D.Mullin	8/25	8/18	Done
Provide specific 1410 data on staffing for next meeting.	7/28	M. Farrell	8/25	8/18	Done
Find out the systems each county is currently using.	7/28	M. Farrell	8/25	8/18	Done
Compile survey results	7/28	H. Moftakhar	8/18	8/18	Done

Action Item	Date Recorded	Assignee	Date Due	Date Closed	Resolution
Conduct surveys	7/28	B.Hocking, P. Gore, C.Karnes	8/14	8/18	Done
Send Workgroup instructions on how to get on the IRG	7/28	K. LaLonde	8/25	9/1	Done
Share information in P3 staffing binder	7/28	K. Yolton/ M. Farrell	8/25	8/13	Done
Add data from Orange County, Kern and San Bernardino to survey analysis and email to participants	8/11	H. Moftakhar	9/01	9/15	Done
Analyze survey results as a bell curve with standard deviations	8/11	H. Moftakhar	9/01	9/15	Done
Present CSTAR data	8/11	H. Moftakhar	9/01	9/01	Done
Arrange to have a guest speaker re: union issues	8/11	B. Holland	9/01	9/15	Done
Obtain summary of other state staffing from J. Dailey	9/1	M. Farrell	9/15	9/15	Done
Obtain written materials from SEIU	9/1	B. Holland	9/15	9/15	Done
Prepare Caseworker Responsibilities for report appendix	9/1	P. Gore	9/15		
Gather state handouts for report attachments	9/1	D. Mullin	9/15		
Draft of Workgroup final report	9/15	K. Yolton	9/29		
Bring soft copy of all mtg minutes	9/15	K. LaLonde	9/29		